

NYSSCPA's Strategic Planning Dashboard

Core Values and Goals

Professional excellence and integrity: Foster community and provide resources that support our members' professional success.

Advocacy: Serve as the uniting force for the CPA profession – to serve as a leading advocate for knowledge and practice informing policymakers and the public.

The Next Generation: Support emerging CPAs in career development.

Public Awareness: Increase awareness of certified public accountants as vital, versatile, trusted professionals in service to the public.

Professional Excellence and Integrity	Broaden membership base to reflect the evolving structure and practice of the profession.	●
	Deploy communication technologies to increase deliverability of member-driven technical resources.	●
	Practice Quality	●
	Emphasize the quality of organization-developed educational offering.	●
	- Deliver formal education to our members and financial professionals through selected seminars, conferences and technical sessions ranging from 1-8 hour sessions.	●
	- Grow web delivery for live events and on demand self study educational programs.	●
- Integrate all content from all areas within the FAE, the Society and Society publications to offer content bundles by key practice and subject areas.	●	
- Grow FAE speakers, authors and discussion leaders to reduce the need to rely on commercial vendors.	●	

- Develop new 1-2 hour webcast series on timely and relevant topics in key subject areas to further grow this side of the business.
- Coordinate FAE's topical and thematic coverage with the CPA Journal, other publications and newsletters to increase the attractiveness, value, competitive advantage and overall success of the education provided to our members.
- Develop a partnership with a prominent CPE provider to complement our CPE curriculum and deliver expanded scope of high quality programs for our members to choose from.
- Work on improving the exchange of knowledge, allowing member choice in "micro communities" and by providing integrated content knowledge that furthers professionalism and excellence in practice.
- Create a database of high profile speakers and influencers for selected CPE programs as speakers and moderators to increase the attractiveness, value, competitive advantage and overall success of our CPE programs.
- Build conferences and web series around prominent and high profile speakers to grow engagement of our members and to generate revenue for the FAE.

Focus on the future of learning.

- Keep abreast of the findings, trends and recommendations of the AICPA task force on the future of learning and the shift to measuring competency achievement from CPE compliance.
- Learn from early adopters about the changes in how CPAs will in the future with short bursts of learning in 10-minute increments, and the regulatory changes and approvals required by the New York State Education Department.
- Provide best in-class education to our members and financial professionals to help them maintain their skills throughout their careers with changes in technology, the workplace and changing expectations of clients, employers and peers.

Advocacy	Develop annual agenda	•
	- Continue to meet annually with Society leadership to develop a forward-looking legislative agenda that is based on staff analysis and feedback from subject-matter experts within the membership.	•
	Improve relationships with legislators and other New York State elected officials.	•
	- Establish office space in Albany within which to coordinate governmental affairs activities and facilitate meetings with legislators and government officials.	•
	- Broaden legislative breakfast program to serve more chapters throughout the state.	•
	- Meet with legislators in their home districts in conjunction with chapter meetings and events.	•
	Maintain level of interactions with regulatory bodies through committees and comment letters.	•
	- Continue to use committee resources to engage state agencies through direct advocacy and the comment letter process.	•
	Advocate on behalf of the individual.	•
	- Engage committees by attending oversight committee meetings and selected other committees to develop action plan for addressing day-to-day practice issues. Open lines of communications with committees to facilitate consistent input on key issues.	•
- Incorporate government affairs discussion opportunities into already established chapter activities to solicit feedback and engage membership throughout the state.	•	
NextGen	Foster new relationships.	•
	- Continue to develop strong relationships with the New York State colleges and universities that lead to a CPA license in order to build awareness of the NYSSCPA brand.	•
	<ul style="list-style-type: none"> ○ Campus Liaisons (faculty) ○ Strengthened the program for 2015-2016 academic year. ○ Continue to visit campuses. 	•

<ul style="list-style-type: none"> ○ Ask campus liaisons to follow us on Twitter and link to our LinkedIn account. - Campus Ambassadors (students) Piloting a Campus Ambassador program on nine campuses 2015-2016. 	
- Develop and support online communities targeted to the Next Gen market.	●
- Regular use of Twitter and Facebook to repurpose Next Gen content and promote Next Gen events.	●
- Identify and follow Next Gen leaders on Twitter	●
- Created issues specific groups on Exchange	●
- Providing more space on Chapter webpages for Next Gen news.	●
- Post Next Gen information on Linked In account.	●
- Link to CPA exam prep providers and like their corporate pages.	●
Prepare candidates for entrance into the profession	●
- Provide CPA Candidates with additional benefits and tools that support them in passing the CPA examination such as providing access to certified tutors and establishing systems for finding study groups.	●
- Working with Roger CPA Review to provide CPA candidates with quarterly educational sessions such as “CPA Exam Game Plan.”	●
- Created Exchange group for candidates to connect and create study groups.	●
- In process of seeking CPA tutors.	●
- Expand the Career Fair program, including the sessions that better prepare candidates for job interviews.	●
- Expanded 2015 Career Fair. 2015 sessions: “Rock Your Resume” webcast to reach more students. “Chatting with Purpose” includes a networking cocktail reception so participants can practice what they have learned. NYSSCPA leaders and Chapter Next Gen members invited to network with participants.	●

Support career development for CPAs at all stages of their careers.	•
- Grow the mentor match program. Have developed a framework for the program that will help individuals navigate the program.	•
- Continue to provide networking opportunities. Events (whiskey tasting, Oktoberfest, etc) and activities (Next Gen Conference and committees) will continue.	•
- Create opportunities for community service activities. In process of developing Statewide Next Gen community service project.	•
- Provide multi-generational data so those entering the profession are more easily understood. <u>In process.</u>	•
- Provide tools for the entrepreneurially inclined. <u>In process.</u>	•
- Develop programs that allow members to set themselves apart from their peers, i.e., presenting, publishing, etc. Promote writing and presenting opportunities to Next Gen members.	•
- Encourage committee chairs to seek Next Gen members and encourage their involvement.	•

- Promote diversity throughout the profession. •
- Continue the COAP program. Mission of COAP program being reinforced. •
- Create Diversity in the Profession Committee. Committee Action Plan being developed. •
- Foster relationships with NABA, Ascend and ALPFA. Will include NABA, Ascend and ALPFA in Young leadership Circle. Will invite members of NABA, Ascend and ALPFA to serve on Diversity in the Profession Committee. •
- Improve messaging regarding the value of a CPA license, i.e., potential salary, job availability, variety of jobs. Sections of the Next Gen website are being rewritten. Promotional brochure being created. •
- Provide data on the importance of a diverse profession. •

Public Awareness

Highlight the contributions and value of the profession and the NYSSCPA to the public.



Highlight the contributions and value of the NYSSCPA to the profession.



Key

Completed 

In Progress 

Not Met 

A Concern 